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## Being a Trustee



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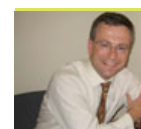
**For Organisations**

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## Volunteers

### Case Stud

This section provides a quick introduction to being a Trustee. It aims to help you understand what is involved in being a trustee and how to chose a good trustee role.



Success Stories of Volunteers.

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*The links below go to different sections on this page or you can download this quick introduction as a PDF.*

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### What is a Board?

A Board is the group that ensures a charity or voluntary organisation:

- has a clear set of goals or strategy
- is making sure the action to achieve those goals is being taken
- meets its legal and financial obligations

Boards may also be called management committees or a Council of Management or Board of Directors.

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### What is a Trustee?

A trustee is a member of the Board or management committee. They may be known as trustees, directors, board members or management committee members. If the charity is also a company limited under guarantee, then the trustees are also directors of the charity.

- Trustees act as a single body
- Trustees ensure the organisation has a clear strategy or set of goals
- Trustees ensure the work and goals of the organisation are in line with its stated vision, usually defined in a governing document and often called the organisation's 'objects'
- Trustees keep a check on the organisation's finances and activities
- Trustees appoint and support the head of staff (e.g. the chief executive or manager of the overall charity or organisation)
- Trustees delegate authority for day to day activities to appropriate staff and/or volunteers
- Trustees take overall legal responsibility for the organisation's work
- Trustees must act in the interests of the organisation not themselves
- Trustees are volunteers and should not, generally, be paid though they should be reimbursed out of pocket expenses for their involvement as a trustee.

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### What are the roles and responsibilities of a Trustee?

NCVO outline 12 main responsibilities of a trustee:

1. Set and maintain vision, mission and values
2. Develop strategy
3. Establish and monitor policies
4. Set up employment procedures
5. Ensure compliance with governing document
6. Ensure accountability
7. Ensure compliance with the law
8. Maintain proper fiscal oversight
9. Select, manage and support the chief executive
10. Respect the role of staff
11. Maintain effective board performance
12. Promote the organisation

For more information take a look at the detail behind on the [12 responsibilities of a trustee](#)

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### **Why do people become trustees?**

Being a trustee should be rewarding and enjoyable. It is a great way to be involved in a community or cause which matters to you. Trustees come from all walks of life and being a trustee can help you meet new people, change your community for the better, learn new skills or use your existing skills in a new context.

You may get involved because it is a cause or an issue you are passionate about, it may be your life has been touched by the work of the voluntary organisation or charity. You may want to build your CV, have experience of strategy and oversight or find out more about the not for profit sector before making a career change.

Being a trustee can expose you to new experiences and new groups of people. It can present you with new challenges, constructive and exciting ones as well as some more difficult things to overcome. You are part of a team as a trustee and will have the opportunity to add your unique skills and experience while learning from others too.

At its heart, being a trustee puts you at the centre of the action for the organisation you are involved in and the more effective the Board of trustees the greater difference you and your organisation will make.

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### **Who can be a trustee?**

The Charity Commission provides guidance on who can be a trustee.

At its simplest, most people over 18 years of age can become trustees, but a few are not eligible. People under 18 can be trustees of an incorporated charity, but cannot be trustees of an unincorporated charity.

Those who have already been disqualified as company directors and those who have been convicted of an offence involving dishonesty or deception cannot usually become trustees. For further guidance, the new NCVO website has a very helpful page on eligibility: <http://www.ncvo-vol.org.uk/node/554>.

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### **What skills do I need?**

Trustees should have different skills, backgrounds and experience that together give a rounded Board.

Some individual trustees will have specific professional or business skills. Others will bring 'soft' skills such as facilitating, team work, problem solving, or even building the social side of being on a Board. Different experiences and perspectives are important and a Board that also reflects the people and communities they service will help improve effectiveness.

So an effective Board will need a range of skills, attributes and personal experience to enable it to work towards the aims and objectives of the voluntary organisation. The skills, diversity and experience a Board needs will come from a wide range of perspectives including business skills, service user experience, social

or family experience, general interests or commitment to the goals of the organisation.

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### **How much time will it take?**

The time commitment will vary from one organisation to another and understanding the likely commitment will probably be part of the discussion you have when exploring a possible trusteeship. Your own commitment to the potential role may usefully be tested as you learn about the time commitment. It may be helpful to ask:

- How many trustee meetings there are each year?
- How long are the meetings, where and at what time of day?
- Are trustees expected to serve on other committees?
- What opportunities are there to spend time with the organisation so you are aware of its work both when you join and on an ongoing basis?
- What contact is there between trustee meetings and how does this usually take place?
- Are there any one off events or annual occasions that trustees are expected, or will have the opportunity, to attend?

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### **What are my legal responsibilities?**

Being a trustee carries legal responsibilities which should be understood before taking up a position. It is worth taking some time to understand these duties and to find out the specific situation at the organisation you are considering joining. If a charity is also a company limited by guarantee then the liabilities of a trustee, for example, are different.

Trustees are not expected to be experts in every area, even with the collective skills and experience of the Board overall. They are expected to use reasonable care in their role as trustees applying their skills and experience and involving professionals where needed. The Charity Commission can offer information and advice on both best practice and legal requirements.

The Charity Commission [Trustee Duties at a Glance](#) is your best starting points – sections D and E cover the basics.

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### **How do I choose a good trustee role?**

Becoming a trustee is significant commitment so making sure you know why you are taking on a role and what is expected of you are appropriate things to consider before you say yes (or no). Each person will have different reasons for considering a role and different motivations in taking it up. These are some points you may want to consider:

- Do you support the aims and activities of the organisation?
- Is the organisation clear about what it does and what it is seeking from a potential new trustee?
- Have you been provided with the information you want/need about the organisation and the way the Board works?
- Have you met the other trustees and what was your response to them?
- Have you met any of the staff or volunteers and do you want/feel able to support them?
- Do you feel inspired by the organisation and want to be involved?
- What is the time commitment asked and can you support it?
- Are your skills and experience going to be appropriate and valued?
- What induction and training will the organisation provide?
- Will any appropriate out of pocket expenses be reimbursed? (i.e. for travel to meetings)
- Are you other commitments, work, home and leisure, going to allow you to undertake this commitment?
- Are you able and willing to complete the legal and security checks required to join the Board of this organisation, including providing references, completing CRB and other security checks?

**Perhaps the simplest question is:** Do you want to get involved?